Configuring Connect

When you have installed Connect into your host Salesforce Org, you must perform several configuration tasks before you start using it. As you configure connect, refer to this checklist to ensure that you complete all the required tasks. We recommend that you complete the tasks in the order presented.

Must-do tasks

For new installations, to prepare all versions of Connect you must perform the following tasks:

☐ 1. Configure custom settings

To ensure that Connect can access ContactWorld, you must configure some settings in Salesforce.

☐ 2. Add Connect to your home page

When you install version 3.0 or later of Connect, you will have a new home page component in your organisation. You must make this component available to enable agents to make calls to dial entries assigned to them.

☐ 3. Add Connect to Service Cloud

To use Connect in a Salesforce console, you must first create a new custom console component, and then add the component to the console. Using this component, agents can make calls in console mode. If you do not use a Salesforce console, you can skip this task.

☐ 4. Add Dial List description to page layout

To make the Dial List description available to agents while making calls, you must add the description to the appropriate page layout or layouts.

☐ 5. Set up Create Dial List buttons

To enable you to create Dial Lists from selected objects in a view, you must add a Create Dial List button to the view or views. Firstly you must create the button and then you must add it to the view or views.

☐ 6. Add custom buttons to Dial List views

Using Connect, you can upload a Dial List from a CSV file or create a Dial List from a report. To use these features, you must add two buttons to the Dial List Lists View.

☐ 7. Enable custom object Dial Lists

When you create a Dial List you must specify the type of object that is included in the list. By default you can create Dial Lists of Contact, Lead, Case, Campaign Member, Account, and Opportunity types. If you want to create a Dial List for a custom object, you must enable Dial Lists for that custom object.

☐ 8. Set up users, permissions and sharing rules

For supervisors and agents to fulfill their tasks in Connect, you must give them the correct access.

☐ 9. Enable agents to use Connect

Optional tasks

You can optionally further customize your installation of ContactWorld for your organization by configuring the following features.

☐ Configure disposition codes (call actions)

Installing Connect provides a default list of disposition codes. You can add new disposition codes to this list.

☐ Configure dynamic Dial List settings

If dynamic Dial Lists are enabled for your account, you can configure the number of Dial Entries that Connect creates and how often Connect refreshes Dial Lists.

☐ Remove the Clone button

If you are using Dial List and Dial List Entry page layouts that have a **Clone** button, the Clone button is redundant.

☐ Automate callback numbers

To configure the callback number presented to the person an agent is calling, you must create an Apex class that implements the NVMContactWorld.ISelectPresentedClid interface.

☐ Add phone fields to Dial List picklists

To make a new phone field available in the phone picklists when you create a new Dial List, you must add the new phone fields to the Create New Dial List or Create New List page.

☐ Make Connect information visible on page layouts and list views

If you have upgraded Connect and cannot see certain custom fields in Dial List records and views, you need to add the custom fields to page layouts and list views.

☐ Remove Connect components that are no longer required

Sometimes we remove components from the managed package but cannot remove them from your org. You can remove these components yourself.